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The Tourism Monographs
No 13, March 1998

Ontario=s Overnight Pleasure Market - 1996

and 1979-1996

Published by the Ministry of Economic Development, Trade & Tourism
Printed by the Queen=s Printer for Ontario
Province of Ontario, Canada

8 1998, Queen=s Printer for Ontario

ISBN 0-7778-7452-0
ISSN 1480-5219

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INTRODUCTION

The information contained in this report, with the exception of the historical data, was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Economic Development, Trade and Tourism.

The historical data in this report are based on information obtained from the ITS and on revised estimates of the CTS done by MEDTT (see "Ontario's Domestic Travel Markets: 1978-1995").

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada during even-numbered years (annually starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1996, an average of 17,540 Canadian households -- including 5,286 Ontario households -- were surveyed every month throughout the year (this sample is double than that used in 1994). The average response rate for Canadian and Ontario respondents was 91%.

While in 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable between 1996 and 1994. Total domestic visits to a provincial region were not known in 1994.

In addition to the change in the location question, in 1996 the CTS captured the interview data on a CAI system, rather than on paper as was the case in 1994.

In 1995, Statistics Canada revised its estimates of Canada's population to include non-permanent residents as well as an estimate for under coverage. Since the CTS is projected to total population, the 1994 data previously released by Ontario in the Tourism Monograph N° 3 (entitled "Ontario's Domestic Travel Markets - 1994") were revised at the end of 1995.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

Length Of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home

Length Of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Overnight	No minimum distance	No minimum distance

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to individual travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 14,599 completed questionnaires by US residents (out of 30,601 usable questionnaires of US visitors to Canada) and 7,035 completed questionnaires by overseas visitors (out of 12,658 usable questionnaires of overseas visitors to Canada). The overall response rate across Canada was 6.8% for US residents and 4.1% for overseas residents.

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Since the ITS long questionnaire does not contain a question on visitor destination, Ontario created a main destination variable according to the number of nights a visitor stays in Ontario/Canada.

2. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

3. Ontario does a number of imputations for missing values.

4. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO'S OVERNIGHT PLEASURE MARKET - 1996

How Many & Where Did They Come From?

In 1996, 106 million person visits were made in Ontario by same day and overnight travellers from across Canada and around the world. Travellers who visited Ontario primarily for pleasure accounted for 42.7% of this total, or for 45.4 million person visits.

TABLE 1: Visitors In Ontario
By Length Of Stay In Ontario, 1996

TABLE 1: Visitors In Ontario By Length Of Stay In Ontario, 1996				
	All Visitors (000's)	Share %	Pleasure Visitors (000's)	Share %
Total	106,289	100.0	45,432	100.0
Same Day	67,344	63.4	28,049	61.7
Overnight	38,945	36.6	17,383	38.3

As was the case with the general visitor population, most of the Ontario pleasure visitors did not stay in the province overnight. However, as Table 1 indicates, pleasure visitors had a higher incidence of overnight stay than the general visitor population.

The remaining of this report focuses on the characteristics of the overnight pleasure visitors and compares these characteristics to those of the general overnight visitor population.

Most of the overnight pleasure visitors in 1996 came from Ontario, then from Michigan and New York. Although Metro Toronto generated 9.1% of Ontario=s overnight pleasure visitors, this share was much smaller than its share of the provincial population (22.2% in 1996), implying that Torontonians did not have a very high incidence of overnight pleasure travel in their own province.

Toronto CMA (see Table 2 footnote), generated 25% of the overnight pleasure travellers in Ontario; that=s 11% more than the corresponding visitors from the whole US.

This share was smaller than this region=s share of Ontario=s population (39.6% in 1996), but not by as much as Metro Toronto=s share, implying that although the residents of the Toronto CMA had a low incidence of overnight pleasure travel in Ontario, this incidence was higher than that of Metro Toronto=s residents.

Of the 17,383 overnight pleasure visitors in Ontario, 16,508, or 95%, had Ontario as their destination. This percentage varied from a high of 98.1% for Ontario residents to a low of 65.4% for overseas residents, with France having the lowest share of visitors with an Ontario destination (19.5%).

TABLE 2: Overnight Visitors In Ontario, 1996				
Origin Of Visitors (000's)	All Visitors	Share (%)	Pleasure Visitors	Share (%)
CANADA	**29,968**	**76.9**	**12,376**	**71.2**
ONTARIO	**27,024**	**69.4**	**11,569**	**66.5**
Toronto MM	3,544	9.1	1,717	9.9
Toronto CMA	8,233	21.1	4,340	25.0
Ottawa/Hull	2,198	5.6	852	4.9
Ottawa RM	1,933	5.0	750	4.3
Niagara Falls	667	1.7	282	1.6
Windsor	491	1.3	190	1.1
QUEBEC	**1,538**	**3.9**	**417**	**2.4**
Montreal	1,010	2.6	245	1.4
Quebec City	99	0.3	23	0.1
MANITOBA	**407**	**1.0**	**196**	**1.1**

TABLE 2: Overnight Visitors In Ontario, 1996				
Winnipeg	350	0.9	175	1.0
ATLANTIC CANADA	**357**	**0.9**	**85**	**0.5**
Halifax	86	0.2	20	0.1
WESTERN CANADA	**643**	**1.7**	**110**	**0.6**
Vancouver	208	0.5	28	0.2
Calgary	137	0.4	21	0.1
Edmonton	79	0.2	7	*
Saskatoon	21	0.1	6	*
Regina	19	*	3	*
USA	**6,788**	**17.4**	**3,893**	**22.4**
Michigan	1,411	3.6	859	4.9
New York	1,266	3.3	800	4.6
Ohio	712	1.8	440	2.5
Pennsylvania	516	1.3	371	2.1
Illinois	360	0.9	224	1.3
Minnesota	276	0.7	167	1.0
Wisconsin	237	0.6	137	0.8
California	225	0.6	84	0.5
New Jersey	161	0.4	75	0.4
Florida	137	0.4	60	0.3
Massachusetts	134	0.3	57	0.3
OVERSEAS	**2,188**	**5.6**	**1,114**	**6.4**
UK	380	1.0	174	1.0
Japan	277	0.7	176	1.0
Germany	209	0.5	122	0.7
France	184	0.5	133	0.8
Hong Kong	104	0.3	49	0.3
South Korea	91	0.2	40	0.2
Australia	67	0.2	33	0.2
Italy	65	0.2	36	0.2
Netherlands	63	0.2	30	0.2
India	46	0.1	31	0.2
Taiwan	43	0.1	23	0.1
Mexico	42	0.1	21	0.1
Israel	41	0.1	20	0.1
Switzerland	39	0.1	22	0.1
Brazil	36	0.1	23	0.1

* Toronto MM (Metropolitan Municipality) includes Toronto, Scarborough, North York, York and Etobicoke. Toronto CMA includes Toronto MM, Peel RM, York RM, Oakville T., Milton T., Halton Hills T., Georgina T., Georgina Island R., Uxbridge TP., Pickering T., and Ajax T.

How Long Did They Stay In Ontario?

Overall, Ontario=s overnight visitors spent 3.19 nights in the province in 1996. This average was almost identical to that of overnight visitors with an Ontario destination (3.20 nights). As expected, overseas overnight visitors stayed the longest (with UK having the longest length of stay among overseas countries), followed by Americans and Canadians.

TABLE 3: Overnight Visitors, 1996 By Length Of Stay In Ontario		
Origin Of Visitors	Average Number of Nights	
	All Visitors	Pleasure Visitors
Canada	2.81	3.12
Ontario	2.61	3.05

TABLE 3: Overnight Visitors, 1996 By Length Of Stay In Ontario		
USA	3.23	3.27
Border States	2.95	3.13
Overseas	8.31	6.36
UK	9.50	8.01
France	4.88	4.10
Germany	8.76	7.30
Japan	3.71	2.61

On the other hand, overnight pleasure visitors had an average length of stay in Ontario of 3.36 nights, primarily due to the fact that Canadians on overnight pleasure trips stayed longer in Ontario than Canadians visiting the province for other reasons.

Overnight pleasure visitors from Canada, or the US, stayed longer in Ontario than other overnight visitors from these countries, while for overseas visitors the opposite was true. Overnight overseas visitors who came to Canada in 1996 for the purpose of visiting their friends or relatives stayed in Ontario twice as long (13.0 nights) as overnight pleasure visitors from these countries.

Over 60% of the overnight pleasure visitors in Ontario stayed in the province 2 nights or less and 75% stayed 3 nights or less. Only 3.9% of the overnight pleasure visitors in Ontario stayed in the province 10-16 nights.

Ontarians on an overnight pleasure trip with an Ontario destination had the highest incidence (79.3%) of taking a short getaway trip (3 nights or less) in the province, followed by Americans (69.4%), while overseas visitors had the lowest incidence of staying in Ontario 1-3 nights (40.8%).

The relationship between a visitor=s proximity to Ontario and this visitor=s length of stay in the province is also evident in tables 2 and 4. With the exception of California, the nearer an area is to Ontario, the smaller its share of person nights and the larger its share of person visits.

TABLE 4: Person Nights In Ontario, By Origin, 1996				
Origin Of Visitors	All Visitors (000's)	Share (%)	Pleasure Visitors (000's)	Share (%)
CANADA	**84,263**	**67.7**	**38,673**	**66.1**
ONTARIO	**70,526**	**56.7**	**35,324**	**60.4**
Toronto MM	9,114	7.3	5,115	8.7
Toronto CMA	21,378	17.2	13,501	23.1
Ottawa/Hull	6,014	4.8	2,411	4.1
Ottawa RM	5,408	4.3	2,323	4.0
Niagara Falls	1,981	1.6	1,095	1.9
Windsor	1,362	1.1	556	1.0
QUEBEC	**4,777**	**3.8**	**1,339**	**2.3**
Montreal	3,194	2.6	823	1.4
Quebec City	312	0.3	71	0.1
MANITOBA	**1,695**	**1.4**	**766**	**1.3**
Winnipeg	1,414	1.1	686	1.2

TABLE 4: Person Nights In Ontario, By Origin, 1996				
ATLANTIC CANADA	**2,644**	**2.1**	**542**	**0.9**
Halifax	558	0.4	169	0.3
WESTERN CANADA	**4,619**	**3.7**	**703**	**1.2**
Vancouver	1,270	1.0	310	0.5
Calgary	1,027	0.8	92	0.2
Edmonton	472	0.4	32	0.1
Regina	125	0.1	30	0.1
Saskatoon	123	0.1	30	0.1
USA	**21,939**	**17.6**	**12,736**	**21.8**
Michigan	3,641	2.9	2.6	2,440	4.2
New York	3,267	1.8	2,105	3.6
Ohio	2,199	1.5	1,456	2.5
Pennsylvania	1,853	1.0	1,389	2.4
Illinois	1,234	0.8	762	1.3
Wisconsin	1,034	0.8	645	1.1
California	940	0.7	255	0.4
Minnesota	880	0.5	591	1.0
Florida	661	0.4	301	0.5
New Jersey	552	0.3	308	0.5
Massachusetts	399		179	0.3
OVERSEAS	**18,190**	**14.6**	**7,088**	**12.1**
UK	3,605	2.9	1,391	2.4
Germany	1,833	1.5	891	1.5
Japan	1,029	0.8	458	0.8
France	899	0.7	544	0.9
Hong Kong	810	0.7	347	0.6
Netherlands	808	0.6	379	0.6
Taiwan	655	0.5	377	0.6
Italy	531	0.4	257	0.4
Australia	486	0.4	138	0.2
South Korea	383	0.3	171	0.3
India	341	0.3	138	0.2
Israel	317	0.3	54	0.1
Switzerland	300	0.2	141	0.2
Mexico	250	0.2	108	0.2
Brazil	232	0.2	105	0.2

* For a definition of Toronto MM (Metropolitan Municipality) and Toronto CMA see footnote to Table 2.

Overall, overnight pleasure visitors generated 58.5 million nights in Ontario, or 47% of the total nights generated in the province by all visitors

Table 4 shows that if the number of person nights generated from each origin is used as the yardstick for ranking each market, then some significant changes are observed. For example, Minnesota falls from being the 6th largest US state, as far as overnight visitors to Ontario are concerned, to being the 8th largest US state, and the Netherlands ascent from the 9th position among overseas countries to the 6th position.

The ranking of the various markets changes further when pleasure nights are used as the yardstick. For example, the incidence of pleasure nights among visitors from California and, especially, Israel was the lowest among all origins (only 17% of Israel=s and 27% of California=s total person nights were generated by pleasure visitors), placing these regions at the bottom of their respective groups when pleasure person nights are used to measure a market=s importance.

What Was The Size & Composition Of Their Travelling Party?

Although most of the overnight pleasure visitors in Ontario travel with one or more companions (63.4%), a sizeable group travels alone (36.6%). The incidence of travelling with no companions was the lowest among American and Japanese visitors (only 9.9% of the Americans and 9.4% of the Japanese overnight pleasure visitors travelled alone) and highest among Canadian pleasure visitors (44.9%).

As a result of the American and Japanese visitors= low propensity to travel alone, their average party size was the highest (2.6 and 2.5 persons, respectively).

TABLE 5: Overnight Party Visits In Ontario
Main Purpose Pleasure, 1996

Origin Of Visitors	Average Party Size (persons)	
	Visitors With An Ontario Destination	Visitors With Any Destination
Canada	2.0	1.9
Ontario	2.0	2.0
USA	2.6	2.6
Border States	2.6	2.6
Overseas	2.3	2.3
UK	2.1	2.1
France	2.2	2.1
Germany	2.1	2.2
Japan	2.6	2.5

Over three quarters (76.6%) of the overnight pleasure visitors in Ontario travelled in groups comprised of adults only and 23.4% travelled with children under the age of 15. Of those travelling in adult parties only, 44.5% travelled in groups comprised of two adults and 7.7% in groups comprised of three or more adults.

The incidence of travel in groups comprised of two adults only was the highest among UK, French, US and German visitors (65.8%, 54.9%, 53.9% and 51.9%, respectively, of all the overnight pleasure visitors from these countries travelled in groups of two adults).

Relative to other groups, Canadians, and Ontarians, had a low incidence of travel in groups comprised of two adults only (30.5% and 30.8%, respectively), and a high incidence of travelling with children (21.7% and 21.8%, respectively), or travelling alone (44.9% and 44.3%, respectively).

Travelling parties comprised of adults only generated 74.9% of the party nights spent in Ontario in 1996. Since this share is lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for Japanese, Americans and Canadian visitors.

How Did They Travel While In Canada?

The overwhelming majority of Ontarios overnight pleasure visitors (88.4%) used the automobile, while in Canada, to travel to Ontario destinations, followed by bus (5.6%), train (1.8%) and air (1.6%).

As expected, Canadian visitors had the highest incidence of automobile use (95.1%), followed by the Americans (71.4%).

Almost half (48.8%) of the overnight visitors who used buses to reach their Ontario destinations, 45.2% of those who relied on automobiles, 36.6% of those who took the train and 15.6% of those who used air, were overnight pleasure visitors.

The overwhelming majority (82.2%) of the American overnight pleasure visitors with an Ontario destination used the automobile to enter Canada (5.0% of which were rented automobiles), followed by buses (8.9%), commercial planes (4.4%), private boats and planes (1.3%), trains (0.6%) and other modes (2.6%).

Of the overseas overnight pleasure visitors with an Ontario destination, 43.5% entered Canada by air directly from their place of residence, an additional 13.3% entered Canada by air via the United States and 43.2% entered Canada via the US by auto.

What Type Of Accommodation Did They Use In Ontario?

Compared to other overnight visitors, pleasure visitors had a much higher incidence of usage of roofed commercial accommodation (41.3% vs. 32.5%) and consequently a lower usage of non-commercial accommodation (37.9% vs. 57.0%). They also had a much higher incidence of utilization of camping/trailer parks (17.3% vs. 8.6%).

TABLE 6: Overnight Visitors in Ontario, 1996
By Type Of Accommodation Used

	All Visitors *('000's)*	Share %	Pleasure Visitors *('000's)*	Share %
Hotel	7,974	20.5	3,988	22.9
Motel	3,426	8.8	2,148	12.4
Other Roofed Commercial	1,682	4.3	1,355	7.8
Camping/Trailer Park	3,330	8.6	3,015	17.3
Any Roofed Commercial	12,659	32.5	7,181	41.3
Non-Commercial	22,183	57.0	6,580	37.9
Other/Not Stated	2,180	5.6	1,307	7.5

These observations varied considerably among overnight pleasure visitors from different origins. For example, only 27.9% of the Canadian pleasure visitors in Ontario used roofed commercial accommodation, 21.3% used camping/trailer park and 47.1% used non-commercial accommodation, such as the homes of friends or relatives. On the other hand, 74.8% of the American overnight pleasure visitors used commercial roofed accommodation and only 12.0% used non-commercial accommodation.

When Did They Visit Ontario?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of travel during the summer, and a much lower incidence of travel during the winter and fall.

TABLE 7: Overnight Visitors in Ontario By Calendar Quarter, 1996

('000's)	All Visitors	Share %	Pleasure Visitors	Share %
Quarter I	6,621	17.0	2,074	11.9
Quarter II	9,348	24.0	4,262	24.5
Quarter III	15,728	40.4	9,020	51.9
Quarter IV	7,247	18.6	2,027	11.7

Over half (51.9%) of the overnight pleasure visitors travelled in Ontario during the July-September period (3rd quarter). This share held across most of Ontario's main markets, with the exception of Japan where it was somewhat lower (41.8% of Japanese pleasure visitors came to Ontario during the summer months).

Canadians from outside Ontario had the highest incidence of travel to Ontario during the first calendar quarter, Japanese had the highest incidence of travel to Ontario during the second and fourth quarters and French had the highest incidence of visiting the province during the third calendar quarter.

Some significant differences between overnight pleasure visitors travelling during different calendar quarters were observed and presented in Table 9. The majority of those visitors travelling in Ontario during the first and fourth calendar quarters used commercial roofed accommodation, while the majority of these visitors travelling in Ontario during the second and third quarters used non-commercial accommodation or campgrounds.

TABLE 8: Overnight Pleasure Visitors In Ontario By Calendar Quarter, 1996

Origin Of Visitors ('000's)	QI	QII	QIII	QIV
Canada	1,693	2,892	6,434	1,356
Share	*13.7%*	*23.4%*	*52.0%*	*11.0%*
Ontario	1,552	2,726	6,032	1,259
Share	*13.4%*	*23.6%*	*52.1%*	*10.9%*
USA	309	1,047	2,023	515
Share	*7.9%*	*26.9%*	*52.0%*	*13.2%*
Border States	281	791	1,502	424
Share	*9.4%*	*26.4%*	*50.1%*	*14.1%*
Overseas	72	323	563	156
Share	*6.5%*	*28.9%*	*50.5%*	*14.0%*
UK	10	53	84	26
Share	*5.9%*	*30.8%*	*48.3%*	*15.0%*
France	2	42	79	10

TABLE 8: Overnight Pleasure Visitors In Ontario By Calendar Quarter, 1996				
Share	*1.6%*	*31.4%*	*59.7%*	*7.3%*
Germany	12	22	69	19
Share	*9.4%*	*18.1%*	*56.5%*	*16.0%*
Japan	14	58	73	30
Share	*7.9%*	*33.1%*	*41.8%*	*17.2%*

As a result of the much higher incidence of commercial roofed accommodation usage, the average spending per overnight pleasure visitor, per night was much higher during the first and fourth quarters than it was during the second and third quarters.

Average spending per overnight pleasure visitor, on the other hand, was lower in the first quarter than it was in the second and third quarters because the average length of stay during the first quarter was lower.

These results held across Canadian and US overnight pleasure visitors (although they were more acute among Canadian visitors), but were reversed among the overseas visitors who had a higher incidence of commercial roofed accommodation usage during the second and third quarters.

TABLE 9: Overnight Pleasure Visitors In Ontario By Calendar Quarter, 1996				
	QI	QII	QIII	QIV
Percent of o/night pleasure visitors using Commercial Roofed Accommodation	52.0%	39.8%	35.7%	58.5%
Percent of o/night pleasure visitors using Hotel	33.7%	23.2%	16.9%	38.5%
Percent of o/night pleasure visitors using the homes of friends/relatives or private cottages	39.9%	39.1%	38.1%	33.8%
Camping/Trailer Park	2.2%	17.4%	23.8%	4.3%
Percent of o/night pleasure visitors having Ontario as their destination	94.3%	95.3%	95.1%	94.5%
Average Length of Stay In Ontario of o/night pleasure visitors (nights)	2.15	2.94	4.01	2.65
Percent of total spending by overnight pleasure visitors by quarter	10.9%	24.5%	51.0%	13.6%
Average spending per o/night pleasure visitor	$177	$193	$190	$225
Average spending per pleasure visitor per night	$83	$66	$48	$85

The percent of overnight pleasure visitors who had Ontario as their destination did not vary appreciably across the quarters (on average 95% of a quarter=s overnight pleasure visitors had Ontario as their destination).

What Did They Do While In Ontario?

Overnight pleasure visitors were more active than other overnight visitors participating, on average, in 2.35 of the activities listed in Table 10, as opposed to 2.03 for the overall overnight visitors.

Participating in outdoor activities was by far the most favoured pastime for overnight pleasure visitors in Ontario (55.4%), followed by sightseeing (41.0%) and shopping (36.6%). Participating in outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors

TABLE 10: Overnight Visitors With An Ontario Destination
Activities Participated In During The Trip, 1996

Activity (000's)	All Visitors	Share %	Pleasure Visitors	Share %
Visit Friends/ Relatives	22,241	59.2	5,709	34.6
Attended Festivals/Fairs	1,885	5.0	1,056	6.4
Attended Cultural Events	4,762	12.7	3,011	18.2
Attended Sports Events	2,308	6.1	1,475	8.9
Shopping	12,288	32.7	6,045	36.6
Sightseeing	10,131	27.0	6,761	41.0
Participated In Nightlife/Entertainment	3,705	9.9	1,707	10.3
Visited Theme Parks	1,101	2.9	713	4.3
Visited Parks Or Historic Sites	4,325	11.5	3,158	19.1
Participated In Outdoor Activities	13,547	36.0	9,147	55.4

TABLE 11: Overnight Pleasure Visitors With An Ontario Destination
Percent Of Visitors Who Participated In Selected Activities, By Origin, 1996

	Origin Of Overnight Pleasure Visitors			
Activity	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	39.6%	39.2%	16.3%	44.2%
Attended Festivals/Fair	5.4%	5.0%	8.6%	11.5%
Attended Cultural Events	10.1%	9.2%	38.8%	47.9%
Attended Sports Events	9.6%	9.4%	6.5%	11.4%
Shopping	25.5%	24.5%	64.2%	80.7%

TABLE 11: Overnight Pleasure Visitors With An Ontario Destination Percent Of Visitors Who Participated In Selected Activities, By Origin, 1996				
Sightseeing	30.8%	29.6%	64.3%	89.6%
Participated In Nightlife/ Entertainment	7.4%	7.1%	18.5%	17.3%
Visited Theme Parks	3.0%	2.8%	5.8%	18.2%
Visited Parks Or Historic Sites	11.3%	10.7%	37.2%	56.5%
Participated In Outdoor Activities	62.3%	63.1%	39.3%	23.9%

Ontarians and other Canadians who visited a provincial destination on an overnight pleasure trip were much more inclined to participate in outdoor activities than the corresponding American or overseas visitors (63.1% of Ontarians vs. 39.3% of Americans and 23.9% of overseas).

On the other hand, Americans and overseas visitors on an overnight pleasure trip to an Ontario destination were much more inclined to go sightseeing, to go shopping, to attend cultural events, to visit parks/historic sites and to participate in nightlife/entertainment than the corresponding visitors from Ontario or Canada. Surprisingly, overseas visitors had the highest incidence of visiting friends/relatives.

These observations imply that international pleasure visitors in Ontario had, in 1996, a more urban orientation than domestic visitors.

TABLE 12: Overnight Visitors With An Ontario Destination Average Spending In Ontario By Activity Group, 1996		
Activity	Average Per Visitor Spending	
	All Visitors	Pleasure Visitors
Attended Festivals/Fairs	$322	$295
Attended Cultural Events	$412	$362
Attended Sports Events	$328	$254
Shopping	$323	$297
Sightseeing	$321	$263
Participated In Nightlife/Entertainment	$397	$332
Visited Theme Parks	$439	$387
Visited Parks Or Historic Sites	$379	$301
Participated In Outdoor Activities	$165	$151

Overnight pleasure visitors that visited theme parks had the highest average spending of all activity groups

($387), followed by cultural visitors ($362) and visitors who participated in nightlife/entertainment ($332).

Although the above ranking of high spenders also held for other overnight visitors, for each activity group pleasure visitors spent less than other overnight visitors (ranging from 8% less for those who engaged in shopping to 21% less for those who visited parks/historic sites).

TABLE 13: Overnight Pleasure Visitors With An Ontario Destination
Average Spending In Ontario By Activity Group & Origin, 1996

	Origin Of Overnight Pleasure Visitors			
Activity	Canada	Ontario	USA	Overseas
Attended Festivals/Fair	$183	$170	$343	$974
Attended Cultural Events	$221	$206	$333	$974
Attended Sports Events	$166	$153	$372	$1,142
Shopping	$177	$167	$311	$867
Sightseeing	$156	$148	$286	$776
Participated In Night-life/ Entertainment	$229	$217	$339	$1,017
Visited Theme Parks	$205	$183	$365	$928
Visited Parks Or Historic Sites	$153	$144	$285	$843
Participated In Outdoor Activities	$99	$96	$317	$990

As expected, overnight pleasure visitors from overseas countries had the highest per visitor spending in Ontario than any other visitor. Among the overnight overseas pleasure visitors, those who attended sports events had the highest average spending than any other overnight pleasure visitor, followed by those who participated in nightlife/entertainment and those who participated in outdoor activities.

The overnight pleasure visitors from the US who attended sports events had the highest average spending among all American overnight pleasure visitors, followed by those who visited theme parks and those who attended festivals/fairs.

The Ontarians who were on an overnight pleasure trip in the province and who participated in nightlife/entertainment had the highest average spending among all overnight pleasure visitors from Ontario, followed by those who attended cultural events and those who visited theme parks.

Which Ontario Regions Did They Visit?

Although Metro Toronto was the top region visited among all overnight visitors, accounting for 22.1% of them, Lakelands was the top region visited (19.4%) among the overnight pleasure visitors, followed by Festival Country (17.3%) and Metro Toronto (17.1%).

In general, given the outdoor nature of the overall overnight pleasure visitors, travel regions that offer more of an outdoor product (such as Ontario=s northern regions, Lakelands and Getaway Country) faired

better among this group of visitors than among other overnight visitors.

Metro Toronto was the most popular region among overnight pleasure visitors from overseas countries and the second most popular region among American overnight pleasure visitors (cultural events/performances and shopping being the main attractions for the Americans). But, the region ranked sixth in popularity among Ontario residents, pointing again to the urban/rural split of Ontario=s international and domestic visitors.

Festival Country was the most popular region among American overnight pleasure visitors and second among the corresponding overseas visitors - a result largely attributable to the draw of Niagara Falls.

As was the case with Metro Toronto, Festival Country did not fair very well among domestic visitors. It was rather Lakelands and the Getaway Country that were the most popular regions among domestic overnight pleasure visitors.

Metro Toronto was Ontario=s most diversified travel region in that no single market accounted for more than 10% of its overnight pleasure visitors (New York, at 9.3%, was the largest) and had the second highest proportion of non-Ontario overnight pleasure visitors (71.5%), after Sunset Country (88.3%).

TABLE 14: Overnight Visitors In Ontario=s Travel Regions, 1996

('000's)	All Visitors	Share %	Pleasure Visitors	Share %
Southwestern Ontario	4,579	11.8	1,556	9.0
Festival Country	6,345	16.3	3,012	17.3
Lakelands	5,312	13.6	3,371	19.4
Metro Toronto	8,595	22.1	2,971	17.1
Getaway Country	4,889	12.6	2,515	14.5
Ontario East	6,571	16.9	2,762	15.9
Near North	952	2.4	437	2.5
Rainbow Country	1,509	3.9	791	4.6
Algoma Country	827	2.1	515	3.0
James Bay Frontier	568	1.5	236	1.4
North Of Superior	746	1.9	399	2.3
Sunset Country	707	1.8	446	2.6
Unknown Ontario Region	246	0.6	104	0.6

Overnight overseas pleasure visitors travelled around the province much more than pleasure visitors from other origins (visiting on average 1.64 travel regions). Americans visited, on average, 1.16 travel regions and Canadians 1.04 travel regions.

As Table 16 indicates, in two thirds of Ontario=s travel regions the top overnight pleasure market was their own residents.

The average length of stay of overnight pleasure visitors in Ontario=s travel regions ranged from a low of 2.20 nights in Festival Country to a high of 4.53 nights in Sunset Country. Overnight pleasure visitors in Ontario=s other travel regions had the following average lengths of stay (in nights): Southwestern 2.48, Lakelands 3.05, Metro Toronto 3.01, Getaway Country 3.59, Ontario East 3.28, Near North 3.27, Rainbow Country 3.64, Algoma Country 2.89, James Bay Frontier 3.62 and North of Superior 3.84.

TABLE 15: Overnight Pleasure Visitors In Ontario=s Travel Regions By Region Visited & Origin, 1996

Region Visited	**Origin Of Overnight Pleasure Visitors**			
	Canada	Ontario	USA	Overseas
Southwestern Ontario	8.0%	8.3%	13.9%	2.4%
Festival Country	10.4%	10.5%	31.7%	44.1%
Lakelands	25.7%	27.3%	3.4%	5.8%
Metro Toronto	8.9%	7.3%	28.3%	69.2%
Getaway Country	18.5%	19.5%	4.5%	4.4%
Ontario East	15.5%	14.3%	13.4%	28.4%
Near North	3.0%	3.1%	1.2%	2.2%
Rainbow Country	5.8%	6.1%	1.4%	2.1%
Algoma Country	1.9%	1.9%	6.6%	2.0%
James Bay Frontier	1.6%	1.7%	0.8%	0.2%
North Of Superior	1.7%	1.5%	4.3%	2.4%
Sunset Country	1.7%	0.4%	6.1%	0.2%
Unknown Ontario Region	0.8%	0.7%	0.1%	0.3%

How Did Ontario=s International Visitors Evaluate Various Aspects Of Their Ontario Trip?

International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to an Ontario destination rated Atransportation services@, Aaccommodation services@, Ahospitality of local people@ and Avariety of things to see and do@ as essentially the same in Ontario as in the US.

TABLE 16: The Top Overnight Pleasure Markets By Travel Region, 1996

Region Visited	% Of A Region=s Overnight Pleasure Market Accounted For By Visitors From (**Origin**):	

Southwestern Ontario	Southwestern (535,000)	34.4%
	Michigan (321,000)	20.6%
	Festival Country (221,000)	14.2%
	Ohio (74,000)	4.8%
Festival Country	Festival Country (383,000)	12.7%
	New York (328,000)	10.9%
	Metro Toronto (316,000)	10.5%
	Southwestern (175,000)	5.8%
Lakelands	Metro Toronto (1,126,000)	33.4%
	Festival Country (766,000)	22.7%
	Getaway Country (586,000)	17.4%
	Lakelands (288,000)	8.5%
Metro Toronto	New York (276,000)	9.3%
	Michigan (274,000)	9.2%
	Ontario East (231,000)	7.8%
	Southwestern (184,000)	6.2%
	UK (137,000)	4.6%
Getaway Country	Getaway Country (943,000)	37.5%
	Metro Toronto (732,000)	29.1%
	Festival Country (228,000)	9.1%
	Ontario East (189,000)	7.5%
Ontario East	Ontario East (884,000)	32.0%
	Metro Toronto (272,000)	9.8%
	Getaway Country (217,000)	7.9%
	Quebec (211,000)	7.6%
Near North	Metro Toronto (94,000)	21.5%
	Festival Country (72,000)	16.5%
	Southwestern (42,000)	9.6%
	Lakelands (39,000)	8.9%
Rainbow Country	Rainbow Country (166,000)	21.0%
	Festival Country (161,000)	20.4%
	Metro Toronto (98,000)	12.4%
	Getaway Country (73,000)	9.2%
Algoma Country	Algoma Country (117,000)	22.7%
	Michigan (90,000)	17.5%
	Minnesota (28,000)	5.4%
	Rainbow Country (28,000)	5.4%
James Bay Frontier	James Bay Frontier (137,000)	58.1%
	Festival Country (15,000)	6.4%
	Getaway Country (11,000)	4.7%
	New York (11,000)	4.7%
North Of Superior	North Of Superior (119,000)	29.8%
	Minnesota (37,000)	9.3%
	Wisconsin (25,000)	6.3%
	Manitoba (17,000)	4.3%
Sunset Country	Manitoba (153,000)	34.3%
	Minnesota (86,000)	19.3%
	Wisconsin (42,000)	9.4%
	Illinois (24,000)	5.4%

Although Avalue for money@ had the highest rating for being better in Ontario than in the US (39.1%), there was an equally large segment of American visitors who felt that Avalue for money@ was not as good in Ontario as it was in the US (25.8%).

AHospitality of local people@ received the lowest negative rating from overnight pleasure visitors from the

US.

TABLE 17: Overnight Pleasure Visitors With An Ontario Destination
AIn comparison with your home, how would you rate the following aspects of your trip in Canada?@

	Services Being Evaluated				
Origin Of Visitors	Transport Services	Accommodation Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
USA					
Better	25.7%	13.0%	39.6%	39.1%	25.5%
Same	65.7%	77.9%	57.1%	35.0%	69.1%
Not as good	8.6%	9.1%	3.3%	25.8%	5.4%
Border States					
Better	26.6%	13.2%	38.8%	38.8%	26.8%
Same	65.5%	77.3%	57.6%	34.8%	67.5%
Not as good	7.9%	9.5%	3.6%	26.4%	5.8%
Overseas					
Better	42.9%	39.0%	47.9%	50.5%	46.3%
Same	41.2%	55.0%	46.7%	33.7%	46.3%
Not as good	15.9%	6.0%	5.4%	15.7%	7.5%
UK					
Better	35.4%	44.5%	56.6%	62.5%	36.1%
Same	48.0%	54.6%	41.5%	33.9%	55.5%
Not as good	16.6%	1.0%	1.9%	3.5%	8.4%
France					
Better	20.0%	26.2%	68.6%	39.6%	21.1%
Same	62.7%	72.9%	29.0%	48.4%	66.1%
Not as good	17.3%	0.9%	2.3%	11.9%	12.8%
Germany					
Better	19.5%	31.0%	70.0%	62.8%	41.4%
Same	53.7%	61.9%	29.0%	29.9%	54.3%
Not as good	26.8%	7.1%	1.0%	7.3%	4.3%
Japan					
Better	24.4%	13.3%	38.6%	51.8%	50.9%
Same	58.3%	73.1%	53.3%	35.3%	46.1%
Not as good	17.4%	13.6%	8.2%	12.9%	2.9%

The majority of the overnight pleasure visitors from overseas countries rated Aaccommodation services@ as the same (55.0%) and Avalue for money@ as being better in Ontario than in their own countries (50.5%). For the remaining services, overseas visitors were divided between those ranking them as Abetter@ and those ranking them as the Asame@. Overall, overseas visitors had a higher negative rating of Atransportation services@ than Americans, with Germans having one of the highest negative rating of this service (26.8%).

With respect to Ontario=s primary overseas markets, UK and German visitors gave Ontario high ratings for Ahospitality of local people@ and Avalue for money@, French gave the province high ratings for Ahospitality of local people@ and Japanese for Avalue for money@ and Avariety of things to see and do@.

How Much Did They Spend In Ontario?

Pleasure visitors= expenditures accounted for 44.3% of the total spending in Ontario by all visitors, while overnight pleasure visitors= spending accounted for 42.9% of the total overnight expenditures in the

province.

TABLE 18: Total Spending Assigned to Ontario Spending Associated With Any Visits In The Province - 1996				
Length Of Stay	All Visitors $Millions	Share	Pleasure Visitors $Millions	Share
Same Day	2,836	26.5%	1,373	29.0%
Overnight	7,855	73.5%	3,367	71.0%
Total	10,691	100.0%	4,739	100.0%

Overall, pleasure visitors had an average spending per person of $104, as compared to an average of $101 of the general visitor population. Overnight pleasure visitors had an average spending per person of $194, while the general overnight visitor population of Ontario had a slightly higher average of $202.

Ontario residents had the lowest average spending per overnight pleasure visitor ($111), as well as per party ($218) and per party per night ($75).

Americans had an average per person spending that was two and a half times higher than that of Ontarians ($283), while overseas overnight pleasure visitors had an average per person spending that was six and a half times higher than that of Ontarians ($731).

Overnight pleasure visitors from the UK had the highest average spending per person, while Germans had the highest average spending per party and Japanese had the highest average spending per party per night.

The high average spending per party per night for the Japanese overnight pleasure visitors is attributable to their high spending on a daily basis as well as to their high average party size. However, given that their average length of stay is quite small (2.61 nights as compared to 8.01 nights for UK pleasure visitors), the average spending per Japanese party or person is low when compared to that of UK or German visitors.

Overnight pleasure visitors from the UK had the highest average spending per person because they also had the longest length of stay (followed by Germans).

Germans had a slightly higher party size than the UK visitors and as such their average per party spending was higher than that of UK visitors.

TABLE 19: Overnight Pleasure Visitors, 1996 Average Expenditures in Ontario			
Origin Of Visitors	Average Per Person	Average per Party	Average Per Party Per Night
Total Canada	$117	$229	$77
Ontario	$111	$218	$75
Total USA	$283	$722	$229

TABLE 19: Overnight Pleasure Visitors, 1996 Average Expenditures in Ontario			
USA Border States	$262	$683	$232
Total Overseas	$731	$1,655	$241
UK	$1,014	$2,083	$260
France	$517	$1,083	$248
Germany	$957	$2,140	$266
Japan	$544	$1,353	$505

Accommodation and food/beverage accounted for most of the overnight pleasure visitors= non-transport spending in Ontario.

Overnight pleasure visitors from the US had a higher share of their non-transport expenditures going to accommodation than any other origin group, partly because of their higher incidence of usage of commercial roofed accommodation.

Overnight pleasure visitors from overseas countries had the highest share of non-transport expenditures going to retail shopping, while Canadians, and Ontarians, had the highest share of their non-transport expenditures going to food/beverage.

When average spending per person, or per party, is used as the yardstick for measuring the importance of the various markets, then overnight pleasure visitors from overseas countries topped all other origin groups. However, on a per party-night basis, US overnight pleasure visitors had a higher average spending on accommodation, food/beverage and recreation/entertainment than the overall overseas pleasure visitors, although when individual overseas countries were examined, they topped the US residents= spending in most categories of expenditures.

For example, Japanese overnight pleasure visitors had the highest average spending on accommodation ($122), food/beverage ($67) and retail ($108) on a per party-night basis, while on a per party basis, overnight pleasure visitors from the UK had the highest average spending on recreation ($165) and Germans had the highest average spending on every other category of expenditure.

TABLE 20: How Overnight Pleasure Visitors Spent Their Non-Transport Budget In Ontario, By Origin, 1996				
Item Of Expenditure	**Origin Of Overnight Pleasure Visitors**			
	Canada	Ontario	USA	Overseas
Accommodation				
% of total spending in Ontario*	37.0%	37.4%	43.5%	32.7%
Average Spending				
Per person	$32	$30	$109	$155
Per party	$63	$59	$279	$351
Per party night	$21	$21	$89	$51
Food/Beverage				

TABLE 20: How Overnight Pleasure Visitors Spent Their Non-Transport Budget In Ontario, By Origin, 1996				
% of total spending in Ontario*	37.5%	37.0%	25.6%	24.1%
Average Spending				
Per person	$33	$30	$64	$114
Per party	$63	$59	$164	$259
Per party night	$21	$20	$52	$38
Recreation/ Entertainment				
% of total spending in Ontario*	12.9%	12.8%	17.6%	12.6%
Average Spending				
Per person	$11	$10	$44	$60
Per party	$22	$20	$113	$136
Per party night	$7	$7	$36	$20
Retail				
% of total spending in Ontario*	12.7%	12.8%	13.3%	30.5%
Average Spending				
Per person	$11	$10	$34	$145
Per party	$21	$20	$86	$327
Per party night	$7	$7	$27	$48

*"Total Spending In Ontario" in this table excludes expenditures on public and private transportation.

How Did Ontario=s Overnight Pleasure Visitors Differ From Its Overnight VFR Visitors?

As expected, a higher proportion of overnight VFR visitors originated in Canada than overnight pleasure visitors (88.3% vs. 71.2%) and a much lower proportion originated in the US (7.4% vs. 22.4%) and overseas countries (4.3% vs. 6.4%).

Overnight VFR visitors travelled in Ontario in adult groups, especially as single adults, while overnight pleasure visitors had a higher incidence of travel with children under 15 (20.0% vs. 16.6%).

TABLE 21: Overnight Visitors In Ontario, 1996		
	Pleasure	VFR
Percent of Visitors Coming To Ontario From:		
Canada	71.2%	88.3%
Ontario	66.5%	80.5%
USA	22.4%	7.4%
Overseas	6.4%	4.3%
UK	1.0%	1.0%
France	0.8%	0.2%
Germany	0.7%	0.4%
Japan	1.0%	0.2%
Percent Of Travelling Parties With:		
Adults Only	76.6%	82.7%
One Adult	36.6%	60.0%
Two Adults	34.1%	20.9%
Three or More Adults	5.9%	1.8%
Children Under 15	20.0%	16.6%
Number Of Nights In Ontario:		
1-3 nights	74.8%	80.2%
Average	3.36	3.09

TABLE 21: Overnight Visitors In Ontario, 1996		
Percent Of Visitors Participating In Selected Activities*:	55.4%	24.1%
Outdoor/Sports	41.0%	14.9%
Sightseeing	36.6%	30.2%
Shopping	34.6%	99.1%
VFR	19.1%	5.2%
Visit Parks/Historic Sites	18.2%	8.4%
Attend Cultural Events Nightlife/Entertainment Attend Sports	10.3%	8.1%
Events	7.7%	3.1%
Visit Theme Park	4.3%	2.0%
Percent Of Visitors By Types Of Accommodation:		
Roofed Commercial	41.3%	7.7%
Hotel	22.9%	4.0%
Camping/Trailer Park	17.3%	1.2%
Non-Commercial	37.9%	93.0%
Percent Of Visitors In Ontario By Season:		
Quarter I	11.9%	20.8%
Quarter II	24.5%	21.8%
Quarter III	51.9%	32.1%
Quarter IV	11.7%	25.3%
Average Spending In Ontario:		
Per Person	$194	$113
Per Party	$402	$185
Per Party Night	$124	$60
Percent Of Total Overnight Spending Accounted For By:	42.9%	21.4%

*These shares are based on visitors with an Ontario destination.

Although a higher proportion of overnight VFR visitors (80.2% vs. 74.8%) took trips in Ontario of a short duration (1-3 nights), the average length of stay of the two groups was comparable (a bit over 3 nights).

Overnight pleasure visitors were much more active than overnight VFR visitors having a much higher incidence of participation in every activity, except visiting friends and relatives.

Overall, overnight pleasure visitors had an outdoors orientation, while VFR visitors had a shopping and VFR orientation, or a more urban orientation.

As expected a much higher proportion of overnight VFR visitors used non-commercial accommodation (93.0% vs. 37.9%), with only 1.2% of them using campgrounds/trailer parks for accommodation (as compared to 17.3% for overnight pleasure visitors).

While the majority of the overnight pleasure visitors travelled in Ontario during the third calendar quarter (51.9%), the overnight VFR visitors were much more evenly spread throughout the year (3rd quarter accounting only for 32.1% of them).

As a result of the lower utilization of commercial accommodation and their smaller size, VFR visitors accounted only for 21.4% of the total spending in Ontario by overnight visitors, while pleasure visitors accounted for 42.9%. Overnight pleasure visitors had an average spending per party-night that was double than that of overnight VFR visitors ($124 vs. $60).

ONTARIO=S OVERNIGHT PLEASURE MARKET: 1979 TO 1996

Overnight pleasure travel in Ontario decreased by 18.8% over the period 1979-1996 from 21.4 million visits in 1979 to 17.4 million visits in 1996. In contrast, total overnight travel in Ontario declined over the same period by 9.4%.

TABLE 22: Overnight Travel In Ontario*

Year	Pleasure (millions)	% Rate Of Change	All Overnight (millions)	% Rate Of Change
1979	21.4	-	43.0	-
1980	19.8	-7.4%	41.0	-4.7%
1981	19.0	-4.1%	40.3	-1.6%
1982	17.3	-9.0%	39.6	-1.7%
1983	17.1	-1.0%	39.2	-0.9%
1984	18.2	6.0%	39.3	0.2%
1985	18.2	0.3%	42.3	7.8%
1986	18.7	2.8%	44.5	5.0%
1987	19.8	5.5%	45.5	2.4%
1988	19.3	-2.5%	47.0	3.2%
1989	17.9	-7.2%	44.5	-5.2%
1990	19.7	9.9%	48.2	8.2%
1991	21.4	8.7%	50.8	5.4%
1992	17.5	-18.0%	43.2	-14.9%
1993	17.7	1.0%	42.1	-2.5%
1994	17.6	-0.4%	40.4	-4.0%
1995	17.7	0.6%	40.4	-0.1%
1996	17.4	-1.9%	38.9	-3.6%

*The numbers in this table may vary slightly from previously published data in Tourism Monographs because a number of respondents who did not state the reason of their trip have been allocated to the various mai trip purposes and included in this table.

The largest decline in overnight pleasure travel was observed in 1992 and was the result of the on-going recession and an exceptionally cold and wet summer (this is the season most pleasure visitors travel in Ontario). Since 1992, however, overnight pleasure travel appears to be recovering better than the overall overnight market, which is declining faster mainly due to the decline in business travel.

TABLE 23: Shares Of Overnight Pleasure Travel In Ontario By Origin				
Year	Origin Of Visitors			
	Canada	Ontario	USA	Overseas
1979	76.5%	72.1%	21.7%	1.8%
1980	75.6%	70.5%	22.1%	2.2%
1981	74.6%	69.4%	23.0%	2.4%
1982	73.4%	68.7%	24.4%	2.2%
1983	74.4%	69.7%	23.7%	1.9%
1984	75.1%	70.5%	23.0%	1.9%
1985	76.2%	70.9%	22.0%	1.7%
1986	74.8%	69.1%	22.9%	2.3%
1987	73.4%	68.0%	23.7%	2.8%
1988	73.5%	67.9%	23.0%	3.5%
1989	73.9%	68.1%	22.0%	4.1%
1990	76.7%	71.6%	19.3%	3.9%
1991	78.9%	74.8%	18.1%	2.9%
1992	75.0%	70.3%	21.1%	3.9%
1993	75.3%	71.1%	20.5%	4.1%
1994	72.4%	66.9%	22.6%	5.0%
1995	71.9%	66.5%	22.6%	5.5%
1996	71.2%	66.6%	22.4%	6.4%

Ontario residents were mainly responsible for the decline in overnight pleasure visits in Ontario during the period under consideration. Overnight pleasure trips by Ontarians declined by 25.1% from 1979 to 1996 and US overnight pleasure visits declined by 16.4%. On the other hand, overseas overnight pleasure visits to Ontario increased by 193.9%.

As a result of these differential rates of growth, Ontarians= importance in the provinces overnight pleasure market declined from 72.1% in 1979, to 66.6% in 1996. Americans= share appears to be fluctuating, throughout the period, around 22% of Ontarios overnight pleasure visitors, while the overseas countries gained in share from 1.8% in 1979, to 6.4% in 1996.

GLOSSARY

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

***Other* accommodation** is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

DESTINATION OF TRIP. In the CTS, the location -- city/town and province (Canada) or city/state (USA) or country (other countries) -- volunteered by the respondent as the *destination* of the trip. If multiple destinations are named in the CTS interview (e.g., a touring trip), interviewers are instructed to record the location that is *furthest* from the respondent's home.

In the ITS questionnaire this question is not available, but rather it is imputed by Ontario based on the majority of nights a visitor spends in Canada..

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents= expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to MEDTT rules.

EXPENDITURES IN ONTARIO BY TRIP CHARACTERISTICS. Ontario expenditures reported for trips with specific characteristics such as activity, are the *dollars* assigned to Ontario by Statistics Canada for trips with the specified characteristic. They do not represent expenditures on the service or activity. For example, the average expenditures associated with trips that included visiting a theme park refer to *average* spending in Ontario on the entire trip. It does not refer to spending *while visiting theme parks*.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention.* In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention.*

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS A respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip=s destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

MAP OF ONTARIO'S TRAVEL REGIONS